# Assign an Action

03/09/2026 11:46 am MDT

When cards are routed to other DocBoss users, the documents are moved to user specific work areas called **Outstanding Actions**. From here, users will make comments on the documents and have the option to upload a new version of the file (if required). Once their review is complete, they will mark their contribution as complete, and the document will continue on its way (i.e., to the next reviewer OR for submittal).
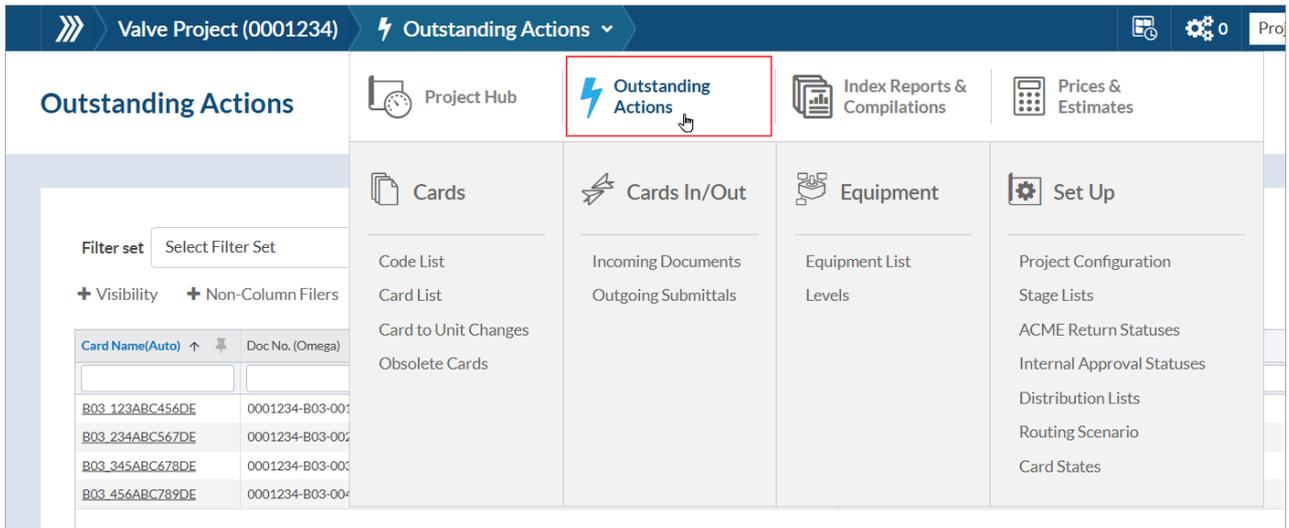
While completing their action, users have the ability to:

(1) Upload a new document
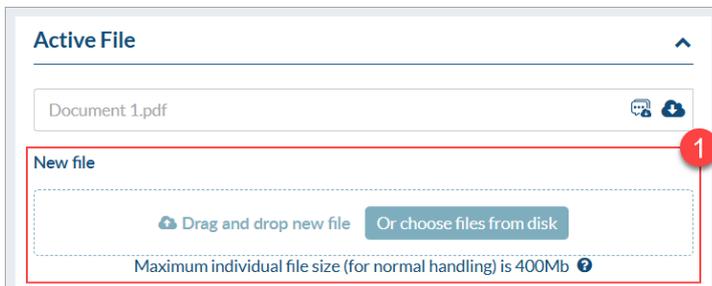
(2) Change where to route the document

Workflow (IFA)

Doc status
B - Approved with Major Comments. Re-submit

Add reviewers (before next submittal) ⦿ Yes ○ No **2**

☑ Doc Controller user
  | Alysha Mosveen ✕ | ⌄ |

☑ Preparer user
  | Clemente Palermo ✕ | ⌄ |

☐ Checker user
  | Select or type ahead... | ⌄ |

☐ Approver user
  | Dwayne Callahan | ⌄ |

Doc Controller action due date
  | 12-Mar-2026 | 🗓 |

Other submittals (before last step)
☐ Queue for submittal to   ○ Sub-Supplier   ○ Internal/Third-Party
☐ Add to Ad-Hoc queue on save (no workflow impact)

(3) Complete the action

3 Complete action
Complete action & notify

| Cancel | Save for later | ▾ | Complete action | ▾ |

The status suffixes for internal routing can be set by the user. There are 4 roles, and the names and abbreviations can be changed by your company admin. Some example role names:

- d – doc controller
- p – preparer
- c – checker
- a – approver

When selecting the routings, there is also the possibility to assign routing to multiple people for each role:

- Each user appears in a removable block.

- Click the drop down to add more users to the routing.

The roles are sequential reviews, meaning that **all** users in that role must complete the review for it to proceed to the next role.

> ℹ️ Once the action(s) is completed for that role (e.g., doc control) and the card moves to the next routing role (e.g., engineer), the action due date will **automatically** update to the number of action turn around days (set on project main - see article: Turn Around Days) after the current date. By default, this is set to 5 days.
>
> For example, if the doc controller role completed their action(s) on September 1st, the action due date for the next role (i.e., the engineer) would be set to 5 days later (September 6th).

NOTE: You can choose a combination of routing and submittals. The routings are always resolved first, then the documents are queued for submittal.